Expected Behaviors: Road Rules for Project Team Member – <u>Not</u> Road Rage

PROJECT MANAGEMENT CHALLENGE 2008

Fifth Annual NASA Project Management Conference
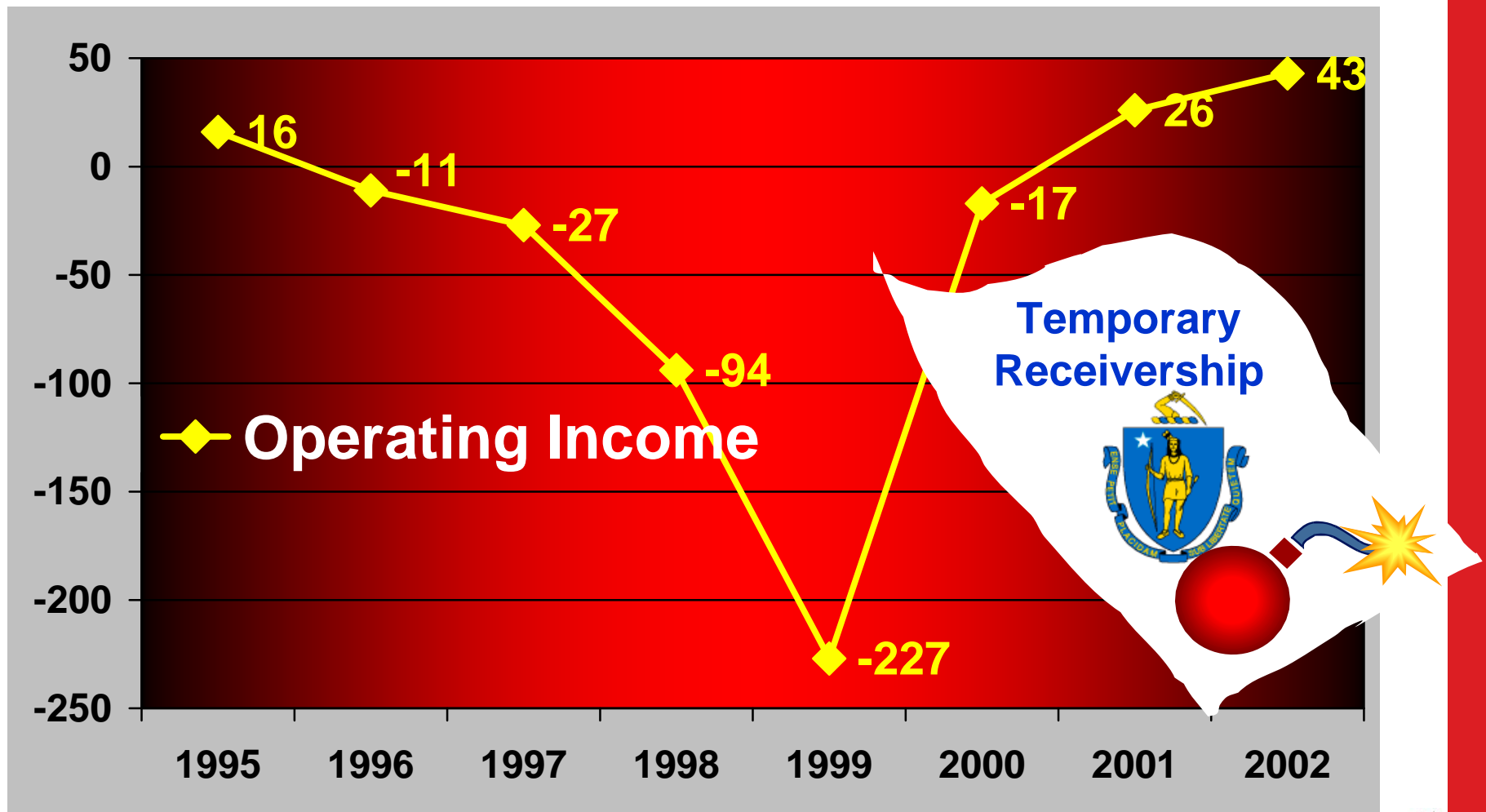
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Who Are We?

- Boston-based Health Plan, over 1M members
- Offers full range of health options
- Has a variety of plan options to help our customers save money
- We provide national coverage
- Members have a broad choice in where they can access care
- We provide Fitness Reimbursement and other Wellness Programs

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Financial Performance $(M)

Awards & Recognition

- **Harvard Pilgrim ranked #1 on the "America's Best Health Plan" list three years in a row.**
  U.S. News & World Report/NCQA*

- **Harvard Pilgrim's HMO recognized three years in a row for providing "An Outstanding Member Experience."**
  J.D. Power & Associates

- **"Plan of Distinction" designation.**
  J.D. Power & Associates

- **"Best Place to Work" in Boston, past five years.**
  Boston Business Journal

- Harvard Pilgrim Health Care was named the nation's top-rated health plan for member satisfaction and quality of care in 2004 by the National Committee for Quality Assurance (NCQA). In 2005 and 2006, Harvard Pilgrim was named the top-rated health plan according to a joint ranking of commercial plans by *U.S.News & World Report* and NCQA. NCQA is a private, non-profit organization dedicated to improving health care quality. "America's Best Health Plans" is a trademark of *U.S.News & World Report.*

Stories from the Road

Today's Goal:

- Where we started

- Where we've been (beware of potholes!)

- Where do we go from here?

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HPHC Expected Behaviors (Driving with Manners)

- Treat others with dignity and respect

- Support and promote intra- and inter-departmental teamwork

- Understand and consider the needs and impacts of your own work on others

- Demonstrate an ability to problem solve and make timely decisions

- Actively seek and receive feedback for improvement

- Consistently share knowledge and information

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Survey Findings (Roadside Service)

EB Tools

EB Survey

Team Liaisons

Team Survey Process

Awareness and Usage of Expected Behaviors

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Expected Behaviors Toolkit
Getting Started

- Discussion Guide
- *Structure a conversation on the EB's*
- Expected Behaviors Survey
- *Assess team performance on the EB's*

Treat others with respect and dignity

- Rules of Engagement
- *Establish group norms in 6 categories*
- "24-Hour" Rule
- *Resolve conflict by communicating directly within 24 hours*

Support and promote intra- and inter-departmental teamwork

- Promoting Teamwork
- *Analyze and resolve risks and dependencies*

Understand and consider needs and impacts of own work on others

- Creating Realistic Agreements
- *Respond realistically to requests, and negotiate priorities*

Demonstrate ability to problem solve and make timely decisions

- Problem-Solving and Decision Support
- *Define decision parameters for involvement, analysis and prioritization*

Actively seek and receive feedback for improvement

- Seeking and Receiving Feedback
- *Initiate feedback conversations effectively*
- Intent-Behavior-Impact
- *Learn the impact of your behavior on others*

Consistently share knowledge and information

- Sharing Information
- *Answer what, who and when of sharing information*

General Tools and Templates

- Agenda Template
- *Send out an agenda easily with an EB reminder*
- Minutes Template
- *Send out minutes easily with an EB reminder*
- Quick Check
- *Evaluate meetings in 8 key areas*
- Stop-Reflect
- *Evaluate meeting effectiveness quickly*
- Temperature Check
- *Defuse tension before it interferes with work*
- EB Survey Results Template
- *Compare your last 3 survey results on this spreadsheet*

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Expected Behaviors Toolkit (Don't Drive Doing This!)

The Toolkit IS NOT:

- A time-consuming, bureaucratic exercise that will slow down work

- A rigid process that teams must follow

- A way to stifle team energy, creativity or limit lively and productive discussion

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Initial Findings: (Souvenirs)

"One Size does not fit all"

- Minimum conditions are: leadership buy-in, stable membership and commitment to purpose

- Survey and Discussion Guide provide good jumping off points

- Group must engage early-use a couple of quick and simple tools –but don't be prescriptive

- Teams vary widely-approach must be flexible and mentorship readily available-role of steward and liaison are critical to success

- Agenda template, Minutes template and Rules of Engagement have almost universal appeal

- Other teams are "catching on" from the "buzz"

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Survey Findings (Roadside Service)

Overall Summary

- Made meetings a more comfortable working environment

- Made meetings "safe" to give feedback

- Made meetings more productive

- Increased the team's efficiency

- Helped the team meet it's deliverables

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Expected Behaviors Tool Kit (Don't Drive Without it!)

The Toolkit IS:

- A way to get work done more efficiently with less "noise"

- A way to take the "sand out of the gears" on teams, projects and between individuals

- A small number of key tools and templates of HPHC "best practices" that teams and individuals can use selectively

Based on your experience to date, we are interested in knowing how strong you believe the "PMO Team" is in the following areas.

Using a scale of 1-7 where 1 = extremely weak, and 7 = extremely strong, please rate the following:

1. Members consistently treat each other with dignity and respect.

Extremely Weak	1	2	3	4	5	6	7	Extremely Strong
	○	○	○	○	○	○	○	

2. Members support and promote intra- and inter- departmental teamwork.

Extremely Weak	1	2	3	4	5	6	7	Extremely Strong
	○	○	○	○	○	○	○	

3. Team/Members are sensitive to how their needs, ideas, or suggestions will impact the workload of others on the team.

Extremely Weak	1	2	3	4	5	6	7	Extremely Strong
	○	○	○	○	○	○	○	

4. Team/Members are sensitive to how their needs, ideas, or suggestions will impact the workload of others not on the team.

Extremely Weak	1	2	3	4	5	6	7	Extremely Strong
	○	○	○	○	○	○	○	

5. Members effectively work together at problem resolution.

Extremely Weak	1	2	3	4	5	6	7	Extremely Strong
	○	○	○	○	○	○	○	

Expected Behavior Survey

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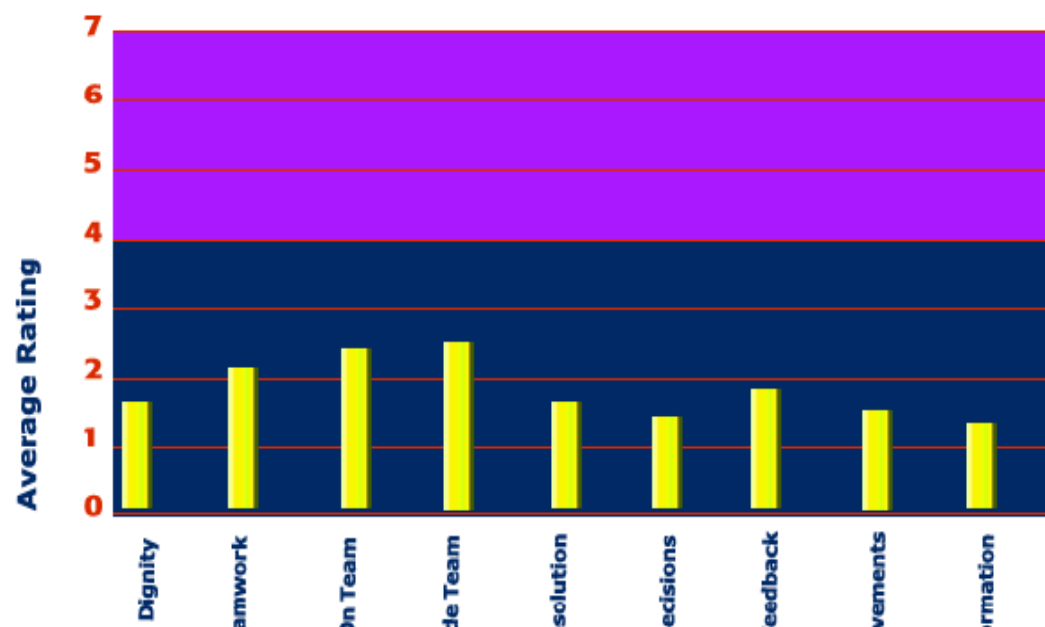|	
Name:	Lisa DiTullio
Team Name:	Harvard Pilgrim / PMO
Report Date:	8/2/05
Number of Responses:	8

Shown below are your team's composite scores in the 9 process areas evaluated. A score of 1 represents the lowest rating, 7 represents the highest. The top graph shows the team's average score for each Behavior. Scores in the dark blue "Low Performance" band should receive priority attention. Click on a yellow bar or scroll down for a detailed view of each score.

Average Rating Graph

Average Rating (y-axis: 0–7)

Categories (x-axis): Dignity, Teamwork, ...n Team, ...de Team, ...solution, ...ecisions, ...eedback, ...vements, ...rmation

Rules of Engagement

Basic Courtesies

Operating Agreements

Problem Solving and Decision Making

Accountability

Conflict Resolution

Leaders Role

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Are We There Yet?

- Corporate Project Teams

- Baseline Survey

- Rules of Engagement

- PMO Support and Guidance

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Expected Behaviors Stories: Postcards from the Edge

- "What Came First, The Chicken Or The Charter?"

- "The Tale of Two Cities"

- "Time Is Of the Essence"

- "New Kid on the Block"

- "Power to the People"

- "Follow The Leader"

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What's Up Ahead?

- Evolving Teams

- Virtual Teams

- Steady Pace?

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Questions?

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